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ABSTRACT

Implementation of a systematic approach to allocation of limited resources for the accomplishment of priority objectives for the St. Louis Park Public Schools (St. Louis Park, Minnesota) was established in 1986, in an effort to provide enhanced, understandable financial reporting and to demonstrate that school district resources are being used to support effective programs. Identified as PPBES (Planning, Programming, Budgeting, and Evaluation System) this program added to the original Board of Education goals the notion that good educational programming involves identification of student needs, program development to address the identified needs, and subsequent measurement of program efficiency and effectiveness. The goals were (1) to plan using the program evaluation data to make decisions annually; (2) to identify the following year's program output and the financial resources necessary to produce them; and (3) to make the annual budget reflect the next year's proposed program objectives, thereby using the program as the basic organizational unit. Evaluation would provide the data to use in the program planning. Workshops were held with principals and teachers, curriculum scope and sequence frameworks were completed, and a budget chart of accounts was begun. The annual cycle of planning is explained. Appended are the following: the goal statements and plans of action, a calendar of planning events, an agenda of the principal's roundtable discussion, an agenda of a summer workshop, and worksheets for curriculum planning. (LMS)

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A PLANNING, PROGRAMMING, BUDGETING, AND EVALUATING SYSTEM FOR ST. LOUIS PARK PUBLIC SCHOOLS

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EA 020 380

Nancy K. Spannaus, Ph.D.

October 3, 1986

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BACKGROUND INFORMATION

The implementation of a PPBES (Planning, Programming, Budgeting, and Evaluation System) has been a multi-year school district goal, with roots which extend to the fall of 1984. At that time, an administrative committee was constituted to examine a Zero-Based Budgeting System (ZBB). The committee met frequently during the 1984-85 school year, in order to determine direction for this effort. Focus was on development of a system which met two goals, as specified by the Board of Education:

- Provide enhanced, understandable financial reporting to the Board of Education;
- Demonstrate that school district resources are being used to support effective programs.

The Zero-Based Budgeting System was thoroughly researched by the committee, and deemed inappropriate, in view of identified objectives. Consensus was reached that a Program-Based Budgeting System (PPBES) would constitute a better match with specified goals. Given this direction, the committee engaged in extensive information gathering on the subject of PPBES, to develop a common conceptual framework. In August of 1985, I joined the staff of St. Louis Park Public Schools, as Director of Fiscal Planning and Administrative Services. I assumed leadership of the PPBES Committee in the fall of 1985, and coincidentally identified PPBES operational planning as the subject of my Bush Public Schools Executive Fellows Program Task Force Project.

Operational Planning

"We want to demonstrate that we are putting money where it counts for excellence"

Rationale

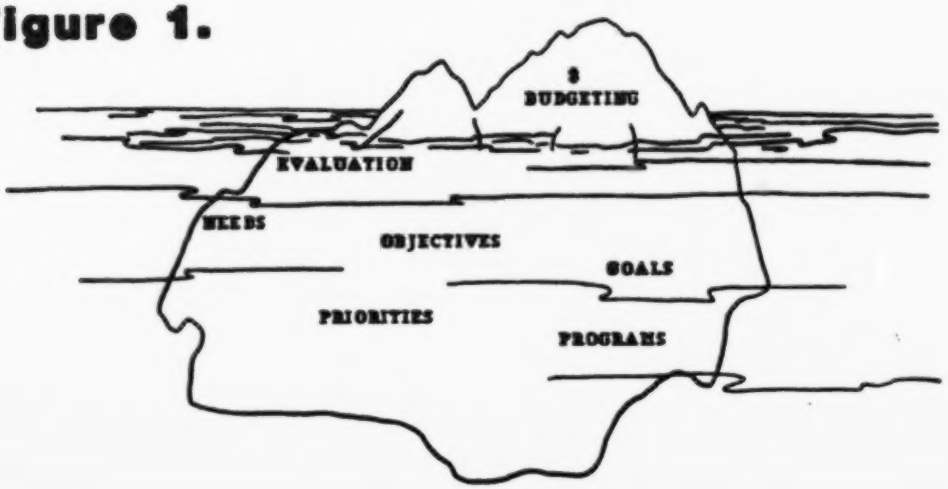
Operational planning for implementation of a PPBES in the 1986-87 school year began with a restatement of rationale for the system. The original Board of Education goals were reaffirmed. There was early recognition that budgeting was only the tip of the PPBES iceberg (see Figure 1.). Accordingly, another basic construct was added, the notion that good educational programming involves identification of student needs, program development to address the identified needs, and subsequent measurement of program efficiency and effectiveness. Awareness that state "Assurance of Mastery" mandates were looming provided an additional incentive to build a system which implements the concept that "evaluation drives instruction".

Underlying Assumptions

Given rationale for development of a PPBES, a working definition for a sytem was cast:

PPBES: A systematic approach to allocation of limited resources for the accomplishment of priority objectives.

Figure 1.



Assumptions underlying the system were next defined. These include recognition that the amount of funds available for school district operation are limited. The focus in funding will be on reallocation of currently available resources; that is, addition of new programs or program augmentations will be accompanied by corresponding program reductions. The necessity for tracking all costs associated with each program was an outgrowth of this assumption. In order to make informed program decisions, we need complete financial data identified by specific program. The need to build the annual school district budget in conjunction with and as an outgrowth of program planning was underscored by this realization.

GOAL DEVELOPMENT

"Our goal is to focus on what students will learn, rather than on what teachers will teach."

Following identification of assumptions underlying the development of a PPBES, goal statements were developed for each phase of the system. They are as follows:

PLANNING: Use program evaluation data to make program (and related budget) decisions annually.

PROGRAMMING: Identify next year's program output (performance) and the financial resources necessary to produce them in the next fiscal year.

BUDGETING: The annual budget will be a byproduct of next year's proposed program objectives, and as such, will use "Program" as its basic organizational unit.

EVALUATION: Provide data for use in annual program planning.

PLAN OF ACTION

Following development of goal statements for each of the four PPBES phases, a "plan of action" was devised and individuals responsible for implementation of each part of the action plan were identified. Exhibit 1 provides a complete set of action plans, to be implemented on an annual basis.

The Planning phase includes collection of planning data and making planning decisions. Planning data include long-range enrollment projections, the previous year's revenue and expenditures, and estimates of budget factors which are used in long-range financial forecasting. Planning involves providing the Board of Education and decision-makers with a current "Status Report" focusing on quantifiable measures of output (student performance). The status report is actually a variety of information, including standardized test results from the previous year, reports from curricular departments completing a year of evaluative self-study, and reports from building principals which review the gaps which exist between current and desired output (student performance) levels for each subject area. The status report and planning data are then used to develop a "Base Case" or baseline for program planning. Key elements of the base case are an estimate of cost of operations for the next year, anticipated revenue, manpower needed, output (student performance) levels for next year with programs operating at a status quo level, and the performance gap for each program in one year and in five years.

PROGRAMMING

The Programming action plan is a direct annual outgrowth of planning activities. Drawing on Planning data, the Board of Education develops and prioritizes school district goals for the next year. In so doing, it examines the

"Base Case", acknowledges program constraints, and establishes desired output levels by the end of a five-year planning period. It also establishes priorities among gaps between current and desired output levels. Output measures are also added or deleted at this point. Following board of education action, building principals receive baseline expenditure budgets for the next year. These data are used in development of building goals for the next year, using an objective oriented planning model. Possible building goals are defined as gaps between current and projected output levels. These are prioritized by staff, in view of district priorities and the building ranking of needs. Alternative methods of attaining the identified building objectives are examined and the most cost beneficial means identified. Job targets for principals and teachers complete Programming action plan activities for the year.

BUDGETING

The Budgeting action plan is inextricably intertwined with the other three PPBES phases. Quantifiable measures of input into the educational process are identified for budget tracking purposes. These include total dollars expended per pupil, pupil teacher ratios, and total dollars allocated per program. On a one-time basis, the complete chart of accounts for the district will be restructured, to conform with the Minnesota Uniform Financial Accounting and Reporting System (UFARS) and enable complete tracking of costs by program. The next year's budget will be prepared by program managers and principals, based on identified objectives. The baseline expenditure budget dictates the "bottom line" funds available for allocation; existing allocations will be altered to reflect progress in each program area toward closing performance gaps. Budget documents will then be prepared and submitted to the Board of Education for approval each May.

EVALUATION

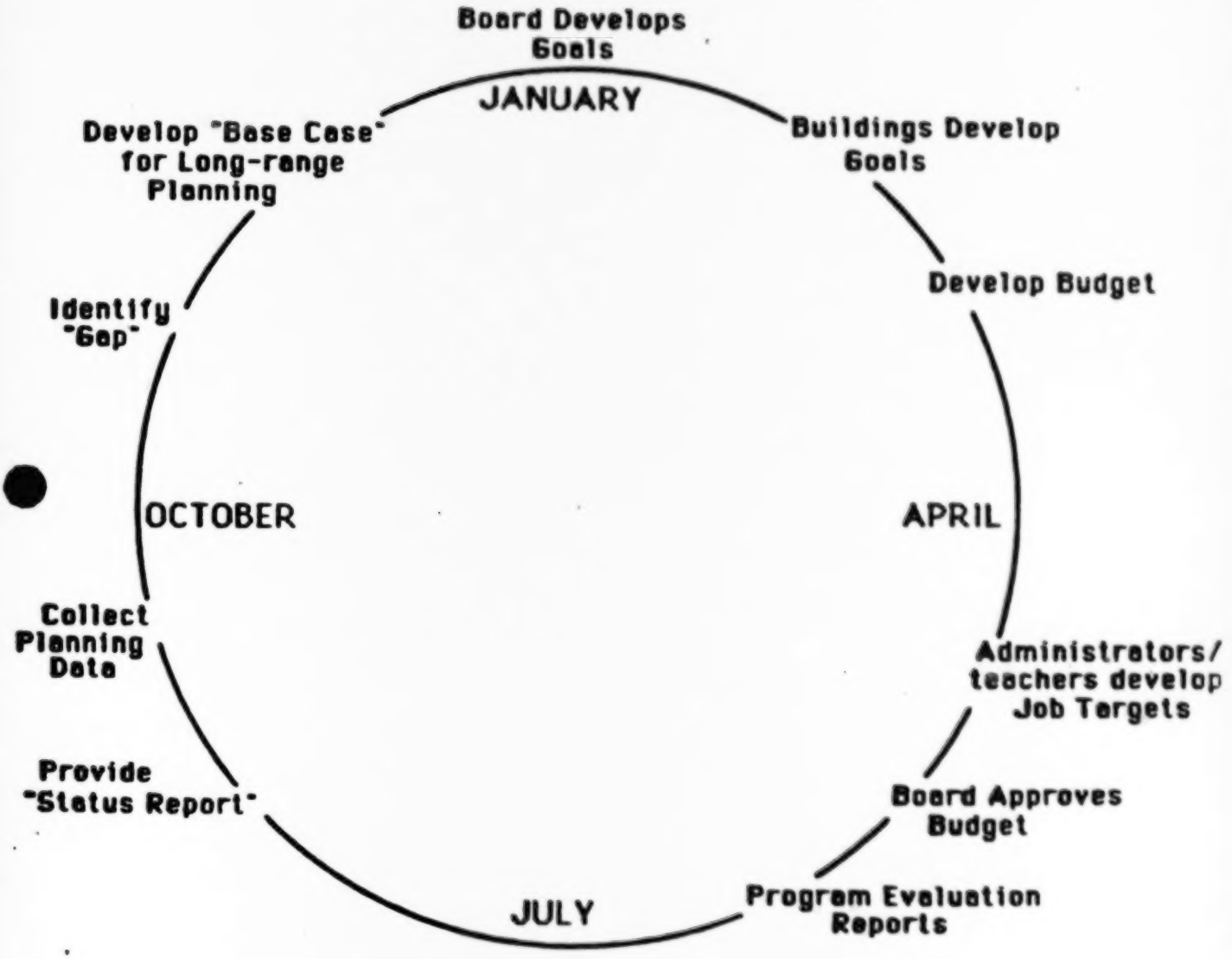
While Evaluation activities may take place throughout much of the year, their impact is most felt during the Planning phase. Quantifiable measures of **input** to the educational process are identified (see Budgeting, above). Likewise, quantifiable measures of **output** from the educational process are identified. These may include average achievement levels of students on nationally normed tests, criterion-referenced test results, the proportion of students achieving mastery of specified learner outcomes, and the proportion of graduates who attend college or other post-secondary training. A means and timeline for measurement of each output is identified, as well as the desired level of output which is the goal (e.g. Ninety percent of all third grade students will achieve mastery of addition of three-digit numbers, at an eighty percent proficiency level, by the end of third grade). From the desired level of output, a "Gap" can be identified between the current level of output and one- and five-year desired levels of output.

ANNUAL CYCLE

A "PPBES Annual Cycle" (see Figure 2.) was devised, to reflect the action plan for the four phases of activity. While it is not possible to neatly link phases to distinct seasons of the year, there are some general time frames with which each phase might most easily be associated. The collection of Planning data is most concentrated in fall. Programming occurs in winter and early spring. Budgeting takes places in fall and winter. Evaluation is either being planned, taking place, or used at every season of the year. The conclusion might very well be drawn that PPBES should highlight Evaluation in its shortened version, rather than Budgeting (i.e. Programmed Budgeting)! Exhibit 2. provides a complete "Calendar of Events" for annual PPBES activities, with dates and individuals responsible for activity completion

Figure 2.

PPBES ANNUAL CYCLE



identified. These are clustered by PPBES phase. Permutations of the calendar of events have been generated, to provide individuals responsible for activities with a personalized calendar, and to identify events chronologically.

IMPLEMENTATION

"Our goal is to improve instruction, not to prove it."

Initiation of PPBES implementation began in the spring of 1986, while operational planning was being finalized. In April, a half-day seminar was conducted for building principals, to familiarize them with PPBES concepts, explain progress to date, and define their role with regard to PPBES. Exhibit 3. is the agenda for that session. A follow-up workshop for principals was held in mid-June. The purposes of this meeting were to identify the principal's role responsibility for use of testing, discuss the bridge between testing and program evaluation, and to facilitate building a staff development plan on testing and evaluation. The format of this session was kept, but modified for a teacher audience, at two workshop sessions on August 26, 1986 (see Exhibit 5.).

During the winter and spring of 1986, extensive curriculum planning was effected by instructional department heads and the Assistant Superintendent for Curriculum and Instruction. A "K-12 Instructional Program Cycle" (see Exhibit 6.) was developed, which provides for five-year cyclical self-examination of all instructional departments. Exhibit 7. provides a detailed review of the five-year cycle components: Orientation, Program Evaluation, Program Development, Program Implementation, and Program Monitoring and Adjustment. The implementation of curriculum review was

initiated in the fall of 1986, and promises to provide invaluable evaluation input to PPBES.

In the area of Budgeting, a primary implementation activity is the complete reconstruction of the school district budget's chart of accounts. The focus of the restructuring is on definition of the budget "Program" dimension in terms of function. This activity was initiated in September, 1986 and the associated timeline calls for activation of the newly structured chart of accounts at the start of the 1987-88 fiscal year.

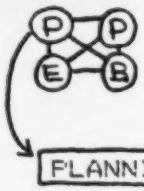
Evaluation represents dynamic instructional change in our district. The underlying notion of PPBES that "evaluation drives instruction" has begun to be translated into action over the past few months. At the close of the 1985-86 school year, principals prepared a "PPBES Year-End Report" for their respective buildings. These reports focused on analysis of test data in reading and mathematics, a proposed course of action to increase the learning of all students, and a plan for assessment of goal accomplishment. Building goals for 1986-87 integrate year-end report findings. Individual building evaluation plans are being coordinated with districtwide Assurance of Mastery (AOM) planning and student evaluation, to be implemented during 1986-87 and 1987-88. At the same time, the district's standardized testing program is being evaluated, to consider the impact of AOM testing and a movement toward criterion-referenced testing, in response to the need for individual student mastery data.

FUTURE PLANS

It is anticipated that implementation of PPBES will continue to gather momentum throughout the coming year. Attention will be focused on dissemination of information about PPBES to staff, and integration of the

multiplicity of planning, programming, budgeting, and evaluation activities which are engaged in at all times of the year, by numerous groups and individuals, under the PPBES umbrella.

Exhibit 1.



GOAL STATEMENT: Use program evaluation data to make program (and related budget) decisions annually.

PLAN OF ACTION:

1. In the fall of the year, collect planning data and make planning decisions:

   - Five-Year Enrollment Projections
   - Estimate budget factors for projection purposes:
     - % of change in EARC values
     - Amount of uncollectables
     - % of change in state aids
     - Desired fund balance
     - % of budgeted funds which are unexpended at year-end
     - Unsettled employee group contract %'s
     - CPI
   - Last year's expenditures by program

2. Provide the Board of Education and decision-makers with current "STATUS REPORT", focusing on quantifiable measures of output (performance):

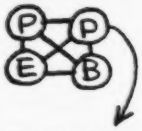
   - School reports to Board
   - Standardized test results from last year
   - Summer of fall report from department just finishing Phase II - Evaluation of curriculum cycle
   - Review of the gaps which exist between current and desired output levels for each subject area

3. Use status report and planning data to develop "BASE CASE" --- baseline for program planning.

   - Estimate of cost of operations (our current expenditure budget worksheet)
   - Estimate of anticipated revenue (plugging in agreed upon budget factors)
   - Estimate of manpower needed (our current January staffing projection)
   - Estimates of output (performance) levels for next year with programs operating as

they currently are

- Estimates of the performance gap for each program area in one year, five years (subjective judgments)



PROGRAMMING

GOAL STATEMENT: Identify next year's program output (performance) and the financial resources necessary to produce them in the next fiscal year.

PLAN OF ACTION:

1. In January/February, the Board of Education develops district goals for the next year:

   - Examine the base case
   - Establish desired output levels by end of five-year planning period
   - Establish priorities among gaps between current and desired output levels
   - Acknowledge program constraints (legal, physical)
   - Decide to add/delete output (performance) measures
   - Adopt long-range district goals which are modifications of existing goals plus any new goals.

2. The Board of Education prioritizes its goals for the coming year.

3. Secondary principals receive baseline expenditure budget by department for next year. Elementary principals receive baseline expenditure budget based on per pupil allocation X 95% of next year's projected enrollment. Baseline school administrative expenditure budgets are also received.

4. Building goals for next year are identified, using an objective oriented planning model:

   - Building staff becomes familiar with district goals for next year.
   - Staff identifies possible building objectives, defined as gaps between current and projected output levels.
   - Staff prioritizes objectives, in view of district priorities and building ranking of needs.
   - Alternative methods of attaining the identified building objectives are examined (based on research or experience of others).
   - Several possible objective-based "projects" are designed, based on the alternatives. The project definition includes:

1. Techniques to be used;
2. Required staffing;
3. Space requirements;
4. Associated costs;
5. Impact on existing programs;
6. Resource usage;
7. Estimate of degree to which program will reach objective.

- Projects are weeded through, to determine best at first glance
- Relative cost versus gains in output are determined for each project
- The most cost beneficial projects are identified.

BUDGETING

GOAL STATEMENT: The annual budget will be a byproduct of next year's proposed program objectives, and as such, will use "Program" as its basic organizational unit.

PLAN OF ACTION:

1. Nancy/Dick, in consultation with the Board of Education, identify the quantifiable measures of input to the educational process which our budget needs to track (see #1 - EVALUATION)

2. Nancy/Dick restructure the chart of accounts to track program costs automatically.

3. Building principals will develop next year's budget, based on identified objectives.

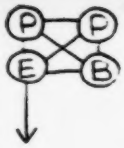
   - Baseline expenditure budget dictates the amount of funds with which to work
   - Existing allocations will be altered to reflect progress in each program area toward closing performance gaps
   - A budget is drawn up for selected cost beneficial projects

4. Budget documents will be prepared by program managers/principals (February/March):

   - Program profile:
     - Current program activities
     - Major program goals (not change much from year to year)
     - Recent performance information
     - Program needs - basis for budget request
   - Dollar allocations by line item

5. Budget document will be submitted to Board of Education for approval (May):

   - Program profiles
   - Program budgets
   - Budget summary reports by program



EVALUATION

GOAL STATEMENT: Provide data for use in annual program planning.

PLAN OF ACTION:

1. Identify quantifiable measures of "INPUT" to the educational process:

   - Total Dollars Expended Per Pupil
   - Pupil/Teacher Ratios
   - Total Dollars Allocated Per Program
     - Each Instructional Department
     - Curriculum Development
     - Testing & Evaluation
     - Administration
     - Staff Development
     - Public Relations & Communications
     - Extracurricular Programs

2. Restructure revenue and expenditure budget into a program budget format, so that input measure data is readily available (see BUDGET section)

3. Identify quantifiable measures of "OUTPUT" (performance) from the educational process:

   - Average achievement levels of students on nationally normed tests
   - Criterion-referenced test results
   - Percent of students achieving mastery of specified learner outcomes
   - Percent of graduates who attend college

4. Determine how and when each "output" will be measured.

5. Identify the desired level of "output" which is the goal (e.g. 90% of third grade students will achieve mastery of addition of three-digit numbers, at the 80% level)

6. Identify the "gap" between current level of "output" and desired level of "output" in one year and in five years.

St. Louis Park Public Schools
St. Louis Park, MN

Exhibit 2.

5/7/86

PPBES - Calendar of Events-Detailed Version

EVALUATION

ACTIVITY	DATE	WHO RESPONSIBLE
1. Identify quantifiable measures of "INPUT" to the educational process:		
-Total dollars expended per pupil	August	DUTHLER
-Pupil/Teacher Ratios	January	SPANNAUS
-Total dollars allocated per program	August	DUTHLER/ SPANNAUS
2. Restructure revenue and expenditure budget into a program budget format	May-Aug 1986	DUTHLER/ SPANNAUS
3. Identify quantifiable measures of "OUTPUT" (performance) from the educational process:		
-Nationally-normed tests	Sept-Jun	GAVENDA/ PRINCIPALS
-Criterion-referenced test results	Sept-Jun	GAVENDA/ PRINCIPALS/ SCOPE & SEQ COMMITTEES
-Percent of students achieving mastery of specified learner outcomes	Sept-Jun	NELSON/ PRINCIPALS
-Drop-out rates	Summer	WAINIO
-Follow-up surveys of graduates	Spring	GUIDANCE/ WAINIO
4. Determine how and when each "OUTPUT" will be measured	March-August, 1986	SPANNAUS/ GAVENDA/ NELSON/ PRINCIPALS/ SCOPE & SEQUENCE COMMITTEES
5. Identify the desired level of "OUTPUT"	March-August, 1986	PRINCIPALS
6. Identify the gap between current level of output and desired level of output in one year and five years	Late Fall	PRINCIPALS
7. Review evaluation data for immediate change implications	Summer	PRINCIPALS

PLANNING

ACTIVITY	DATE	WHO RESPONSIBLE
1. Collect planning data and make planning decisions:		
-Five-year Enrollment Projections	October	SPANNAUS
-Estimate budget factors for projection purposes	Sept-October	DUTHLER/ SPANNAUS
-Last year's expenditure by program	Sept	DUTHLER
2. Provide Board of Education and decision-makers with current "status report", focusing on quantifiable measures of output (performance):		
-School reports to Board	Fall	PRINCIPALS
-Standardized test results from last year	Summer	GAVENDA
-Report from department just finishing Phase II-Evaluation of curriculum cycle	Summer-Early Fall	NELSON
-Review of the gaps which exist between current and desired output levels for each subject area	Fall	NELSON/ PRINCIPALS
3. Use status report and planning data to develop "BASE CASE"---baseline for program planning:		
-Estimate of cost of operations (CPI-projected expenditure budget forecast)	December-January	SPANNAUS/ DUTHLER
-Estimate of anticipated revenue	November	DUTHLER
-Estimate of manpower needed	January	SPANNAUS
-Estimates of output (performance) levels for next year with programs operating as they currently are	Fall	PRINCIPALS/ NELSON
-Estimates of the performance gap for each program area in one year and five years	Late Fall	PRINCIPALS/ NELSON
4. Do building and classroom planning based on spring evaluation data, to effect immediate change in fall	Summer	PRINCIPALS

PROGRAMMING

ACTIVITY	DATE	WHO RESPONSIBLE
1. Board of Education develops district goals for the next year	January-February	HOLMSTROM
2. Board of Education prioritizes its goals for the coming year	January-February	HOLMSTROM
3. Principals receive baseline expenditure budget by department for next year	February	SPANNAUS
4. Building goals for next year are identified, using an objective oriented planning model	February-March	PRINCIPALS
5. Principals and teachers develop personal job targets for next year	April-May	PRINCIPALS/TEACHERS

BUDGETING

ACTIVITY	DATE	WHO RESPONSIBLE
1. Identify quantifiable measures of input to the educational process which our budget needs to track	March, 1986	DUTHLER/ SPANNAUS
2. Restructure the chart of accounts to track program costs automatically	May-August, 1986	DUTHLER/ SPANNAUS
3. Develop next year's budget, based on identified objectives	February-March	PRINCIPALS/ PROGRAM MANAGERS
4. Budget documents are prepared by program managers/principals -Program profile -Dollar allocations by line item	February-March	PRINCIPALS/ PROGRAM MANAGERS
5. Budget document submitted to Board of Education for approval -Program profile -Program budgets -Budget summary reports by program	May	DUTHLER/ SPANNAUS

Exhibit 3.

ST. LOUIS PARK PUBLIC SCHOOLS
St. Louis Park, Minnesota

PRINCIPALS' ROUNDTABLE
Wednesday, April 23
9:30 - 11:30 A.M.

AGENDA

I. Overview of PPBES Concepts, Planning ..... Nancy
   - PPBES Annual Cycle (Draft)

II. Scope & Sequence and PPBES ..... Mary Ann
   - Program Evaluation (Draft)

III. Elementary School Implications ..... Pat
   - PPBES Responsibilities of the Building Principal (Draft)

IV. Secondary School Implications ..... Dick W

V. PPBES Year-end Reports ..... Carl
   - End of Year Evaluation (Draft)

Exhibit 4.

St. Louis Park Public Schools
St. Louis Park, Minnesota

SUMMER WORKSHOP FOR PRINCIPALS
TESTING: INTERPRETATION AND USE

June 13, 1986 - 7:30-12:00
Sheraton Park Place - Courtyard 2

AGENDA

7:30 **BREAKFAST**

8:15 **I. DEFINITIONS OF TESTING**

A. Ability Testing - JIM
1. School
2. Intellectual

B. Achievement Testing - NANCY
1. Norm-referenced Testing
2. Criterion-referenced Testing

8:35 **II. USES OF TESTING BY PRINCIPALS**

A. Knowledge/Interpretation of Student Performance - JIM

9:00 1. Role Play: Parent/Teacher Conference
9:10 2. Role Play Debriefing

9:25 B. Communicating Results to Staff/Parents/Community - NANCY

C. Facilitating Teachers' Instructional Decision-making

9:40 1. Role Play: Teacher/Principal Conference
9:50 2. Role Play Debriefing

10:05 [illegible]

10:20 D. Principals' Instructional Decision-making For Their School - MARYANN
1. Amount of Time per Subject
2. Grouping of Students
3. Instructional Emphases from District Curriculum
4. Curriculum Extensions (Field Trips, Assemblies, Etc.)
5. Use of Staffing, Budget, Staff Development Resources)

10:30 E. Contribution to Principals' Year-End PPBES Report
1. Small Group Discussions: This Year's PPBES Report
11:30 2. Small Group Debriefing

11:55 **III. WORKSHOP EVALUATION**

12:00 **IV. ADJOURNMENT**

St. Louis Park Public Schools
St. Louis Park, Minnesota

Exhibit 5.

BACK TO SCHOOL WORKSHOP MINI-SESSION
INSTRUCTIONAL USE OF STUDENT ASSESSMENT IN THE CLASSROOM

Tuesday, August 26, 1986
Hotel Sofitel

AGENDA

I. DEFINITIONS OF TESTING

A. Ability Testing
   1. School
   2. Intellectual

B. Achievement Testing
   1. Norm-referenced Testing
   2. Criterion-referenced Testing

II. INTERPRETATION OF STUDENT PERFORMANCE

III. USES OF ASSESSMENT DATA

A. Use of Individual Assessment Data
   1. Preparation for Parent/Teacher Conferences
   2. Conducting Parent/Teacher Conferences

B. Use of Group Assessment Data
   1. Types of Instructional Decisions from Assessment
   2. Modification of Instruction

IV. QUESTION/ANSWER

Exhibit G

WORKSHEET FOR SCOPE & SEQUENCE PLANNING
K-12 Instructional Program Cycle

	Phase 1 Program Intent	Phase 2 Evaluation	Phase 3 Program Development	Phase 4 Program Implementation	Phase 5 Monitor and Adjust
1985-86	Language Arts	Math	Science	Social Studies	
		Foreign Language	Music		
1986-87	Reading	Language Arts			
	Health				
	Art				
1987-88	Social Studies	Reading			
	Vocat. Cluster *	Health			
	Physical Education	Art			
1988-89	Science	Social Studies			
	Music	Vocat. Cluster *			
		Physical Education			
1989-1990	Math	Science			
	Foreign Language	Music			
1990-1991	Language Arts	Math			
		Foreign Language			
1991-1992	Reading	Language Arts			
	Health				
	Art				

* Vocational Cluster = Business, Work/OJT, Industrial Arts, and Home Economics

Notes for cluster of curriculum areas:
(1) Combine one core area with two elective areas each year? * = currently S & S committees

Art	Industrial Arts	Reading *
Business	Language Arts *	Science *
Consumer Homemaking	Math *	Social Studies *
Foreign Language *	Music	Student Services (guidance/social worker, special ed?)
Health	Physical Education	

(2) Assurance of mastery implementation procedures in math and communications (language arts and reading) due in 1986-87.

ST. LOUIS PARK PUBLIC SCHOOLS
K-12 INSTRUCTIONAL PROGRAM CYCLE

DRAFT

Rev. 11-85; 12-85; 1-86, 3-86

This plan provides for continuous curriculum review, evaluation, and validation/ revision by all subject areas over a self-repeating five-year cycle. The five separate phases will each last for approximately one year. Listed below are suggested activities for each K-12 subject steering committee.

Phase I. Orientation and review of program intent
II. Conduct program evaluation
III. Establish plan for program development
IV: Implement program
V: Monitor and adjust

Exhibit 7.

Phase I: Review Current District Program Intent

___ Select K-12 subject sterring committee with balanced teacher representation (by level and building) and administrator representative(6).

___ Elect committee chair(s), and other leadership roles as needed.

___ Develop consensus on committee procedures - membership terms/rotation; meetings/agendas; communications/ record-keeping; decision-making process; budget monitoring.

___ Review this district cycle for instructional programs - product and process goals and objectives

___ Review roles of representational groups - Board; superintendent; administrative team; department/grade level chairs; K-12 scope-sequence chairs; curriculum advisory council; total staff

___ Review State Department curriculum requirements for programs

___ Review district board-approved mission statement and goals for all K-12 subject programs.

___ Develop/review K-12 subject mission statement (rationale for why we teach this subject) and K-12 subject goals; amend as needed to reflect "what is"

___ Develop/review K-12 expected learner outcomes by grade level (skills, attitudes, content knowledge) in current scope and sequence plan; amend as needed to reflect "what is"

___ Review current course syllabi; texts; materials; supplies; budgets; evaluation plans for each grade level (K-6) and course (7-12) in subject area

___ Consider District/school goals for programs, delivery systems and instructional priorities that are prescribed by Project 85 + 15; district technology plan; district or building staff development plans.

___ Review current district staffing and budget resources allocated to subject programs.

___ Record formative evaluation (committee ideas to improve program or process so far)

___ Develop preliminary evaluation steps planned for Phase II

___ Develop/implement communications plan to tell staff, students, and the community what's happening and gather their feedback for the committee.

Phase II: Conduct Program Evaluation

___ Review preliminary program evaluation plan and feedback received in Phase I

___ Develop committee consensus on how to measure/assess. . .

___ new ideas or trends from SDE, universities, professional organizations, ERIC research, Educational Research Service, other literature/research, consultants, staff members

___ exemplary programs in other departments or other districts

___ NCA internal and external review of programs and/or School Effectiveness program review

___ feedback from students, staff, administration, school board and community about needs for the subject

___ current expectations, standards for student achievement in the subject

___ student achievement assessment data for the subject from:
criterion-referenced assessments
PER data or norm-based standardized assessments
Minnesota Piggyback Assessments or Minnesota Assessment Program data
teacher judgments
other district assessments to analyze learning styles, rates, abilities, needs of students

___ research-based instructional methodologies that focus on improving learning and SLP staff development needs

___ Agree on final evaluation plan with criteria for analysis, standards to set and measurement instruments

___ Conduct summative evaluation and study results

___ Conduct formative evaluation of K-12 committee work so far

___ Identify draft of program needs based upon this evaluation process

___ Report draft of program evaluation findings to staff, students, and community; gather their feedback for the committee.

Phase III: Establish Plan for Program Development

___ Review Phase II evaluation results and feedback received

___ Develop committee consensus
- ___ What are our program development needs (strengths, weaknesses, areas for improvement)
- ___ What changes should be made to improve our programs?
  - Curriculum changes? (goals, learner outcomes, standards setting, instructional methods, curriculum materials, etc.)
  - Budget changes? (reallocation of resources within one program or among other programs)
  - Staffing needs? (FTE needs, staff development needs)

___ Identify resources needed to make changes and communicate to staff/administration

___ Establish plan for program development
- ___ program structure changes to suggest (goals; scope and sequence chart; learner outcomes)
- ___ curriculum development/writing/recruiting proposals
- ___ methods/inservice needed to improve instruction
- ___ new textbook/materials selection and software selection process to follow
- ___ budget proposals for capital expenditures, general fund expenditures (staffing plus material/equipment)
- ___ staff development needs
- ___ additional assessment data needed by staff
- ___ standards to be used in measuring progress

___ Conduct formative evaluation of K-12 committee work so far

___ Report Phase III findings to staff - gather feedback

Phase IV: Implement Programs

___ Implement plans for program development from Phase III
- ___ program structure modified (goals; scope and sequence chart; learner outcomes)
- ___ curriculum writing/rewriting utilized in classrooms
- ___ new materials selected, purchased, implemented -- teachers must use. . .
- ___ inservice for staff conducted
- ___ staff development programs scheduled to improve instruction
- ___ additional assessments needed are completed
- ___ budget utilization monitored
- ___ achievement of standards monitored

___ Conduct formative evaluation of K-12 committee work so far

___ Report Phase IV results - gather feedback

Phase V: Monitor and Adjust

___ Monitor success of Phase IV Implementation and continue formative evaluation of K-12 committee work

___ Adjust program implementation (fine-tuning) as needed in areas of program goals, learner outcomes, scope and sequence chart (to reflect "what should be"), curriculum materials, teacher inservice, budget resources use, and assessment instruments. . .to reflect past five year's experience and/or changing focus .

___ Report Phase V results to staff, students and community gather their feedback in preparation for beginning cycle again.

Title: **A PLANNING, PROGRAMMING BUDGETING, AND EVALUATING SYSTEM FOR ST. LOUIS PARK PUBLIC SCHOOLS - EXECUTIVE SUMMARY**

Author: **Nancy K. Spannaus, Ph.D.**

Background Information

The implementation of a PPBES (Planning, Programming, Budgeting, and Evaluation System) in the St. Louis Park Public Schools began in 1984-85 with a year of conceptual planning and information gathering. A second pre-implementation year, in 1985-86, focused on operational planning. This operational planning is the focus of my task force project. Two goals were specified by the Board of Education:

- Provide enhanced, understandable financial reporting to the Board of Education;
- Demonstrate that school district resources are being used to support effective programs.

The rationale for undertaking the PPBES venture affirmed these goals, and added the notion that good educational programming involves identification of student needs, program development to address the identified needs, and subsequent measurement of program efficiency and effectiveness. From the rationale, a working definition of PPBES was caste:

> **PPBES: A systematic approach to allocation of limited resources for the accomplishment of priority objectives.**

Assumptions underlying the system were next defined. These included a recognition of funding limitations for instructional program augmentation and a need to be able to track costs associated with programs.

Goal Development

Following identification of underlying assumptions, goals statements were developed for each phase of the system. They are as follows:

PLANNING: Use program evaluation data to make program (and related budget) decisions annually.

PROGRAMMING: Identify next year's program output (performance) and the financial resources necessary to produce them in the next fiscal year

BUDGETING: The annual budget will be a byproduct of next year's proposed program objectives, and as such, will use "Program" as its basic organizational unit.

EVALUATION: Provide data for use in annual program planning.

Plan of Action

Following development of goal statements for each of the four PPBES phases, a "plan of action" was devised and individuals responsible for implementation of each part of the action plan were identified. A "PPBES Annual Cycle" was then devised, to reflect action plan activities. This was followed by development of a complete "Calendar of Events" for annual PPBES activities, with dates and individuals responsible for activity completion identified.

Implementation

Initiation of PPBES implementation began in the spring of 1986. Workshops have been held with principals and teachers, curriculum scope and sequence framework planning completed, a budget chart of accounts restructuring begun. Assurance of Mastery and standardized testing planning initiated. It is anticipated that ongoing implementation of PPBES will focus on dissemination of information about the system, and integration of the multiplicity of planning, programming, budgeting, and evaluation activities which are engaged in by numerous groups and individuals, under the PPBES umbrella.